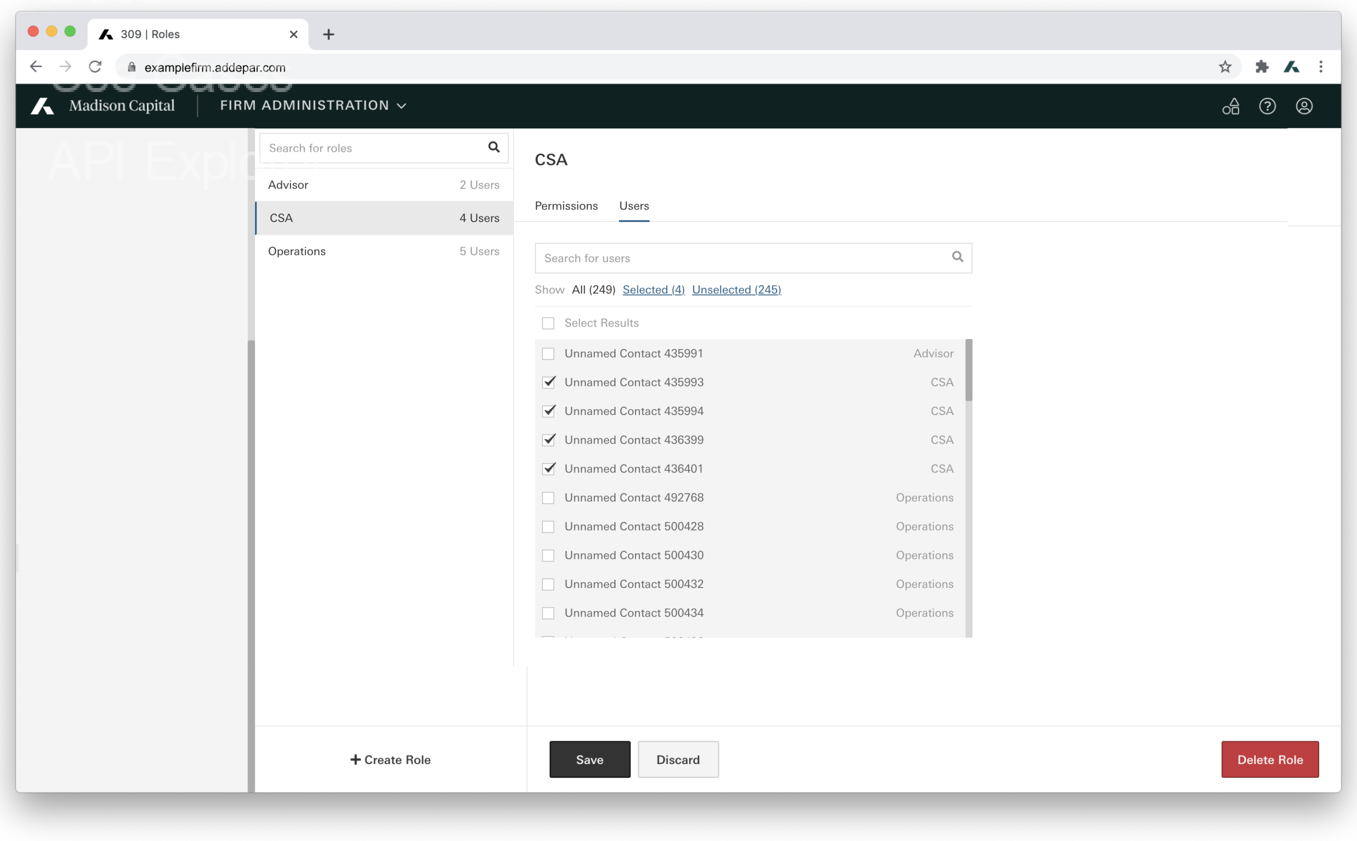
Roles

Roles represent standard sets of permissions available to your firm. Use the Roles API to view your firm's roles, and add or remove the users assigned to each role.



Role	Users
Advisor	2 Users
CSA	4 Users
Operations	5 Users

Show All (249) Selected (4) Unselected (245)

□ Select Results

	Contact	Role
□	Unnamed Contact 435991	Advisor
☑	Unnamed Contact 435993	CSA
☑	Unnamed Contact 435994	CSA
☑	Unnamed Contact 436399	CSA
☑	Unnamed Contact 436401	CSA
□	Unnamed Contact 492768	Operations
□	Unnamed Contact 500428	Operations
□	Unnamed Contact 500430	Operations
□	Unnamed Contact 500432	Operations
□	Unnamed Contact 500434	Operations

Base Route	/v1/roles
Endpoints	**GET** /v1/roles/:id /v1/roles /v1/roles/:id/relationships/assigned_users /v1/roles/:id/assigned_users **POST** /v1/roles/:id/relationships/assigned_users **PATCH** /v1/roles/:id/relationships/assigned_users **DELETE** /v1/roles/:id/relationships/assigned_users
Produces	JSON
Pagination	Yes
Application Permissions Required	"API Access: Create, edit, and delete" "Manage firm settings: Users and permissions" for all operations.

OAuth Scopes	**GET**
	`USERS` and `USERS_WRITE`
	POST, **PATCH**, and **DELETE**
	`USERS_WRITE`

Resource Overview

The attributes below will always appear in **GET**, **POST**, and **PATCH** responses.

ATTRIBUTE	DESCRIPTION	EXAMPLE
`name`	The name of the role. String.	`"Platform Team"`

Relationships

RELATIONSHIP	DESCRIPTION
`assigned_users`	Users assigned to the role.

RELATIONSHIPS

```
"relationships":{
  "assigned_users":{
    "links":{
      "self":"/v1/roles/455914/relationships/assigned_users",
      "related":"/v1/roles/455914/assigned_users"
    },
    "data":[
      {
        "type":"users",
        "id":"621500"
      }
    ]
  }
}
```

> **Note**
>
> Creation, deletion, and modification of roles are done from within the application. Roles must be created in the application before the API can be used to update its members.

Get a Role

Returns the details for a specific role.

GET `/v1/roles/:id`

Example:

REQUEST RESPONSE

```
GET https://examplefirm.addepar.com/api/v1/roles/80
```

Responses

- `200 OK` : Success
- `403 Forbidden` : User lacks sufficient application permissions
- `404 Not found` : No role exists with the provided ID in the firm

Get All Roles

Returns a list of all roles at the firm.

GET `/v1/roles`

Example:

REQUEST RESPONSE

```
GET https://examplefirm.addepar.com/api/v1/roles
```

Response Codes:

- `200 OK` : Success
- `403 Forbidden` : User lacks sufficient application permissions

Get a Role's Users

Returns a list of IDs for all users assigned to a specific role.

GET `/v1/roles/:id/relationships/assigned_users`

Example:

REQUEST RESPONSE

```
GET https://examplefirm.com.addepar.com/api/v1/roles/80/relationships/assigned_users
```

Response Codes:

- `200 OK` : Success
- `400 Bad Request` : Invalid relationship queried
- `400 Bad Request` : Include parameter not supported
- `403 Forbidden` : User lacks sufficient application permissions
- `404 Not Found` : Nonexistent/non-permissioned role ID

Get a Role's User Details

Returns details about the users assigned to a specific role.

GET `/v1/roles/:id/assigned_users`

Example:

REQUEST RESPONSE

```
GET https://examplefirm.addepar.com/api/v1/roles/80/assigned_users
```

Response Codes:

- `200 OK` : Success
- `400 Bad Request` : Invalid relationship queried
- `400 Bad Request` : Include parameter not supported
- `403 Forbidden` : User lacks sufficient application permissions
- `404 Not Found` : Nonexistent/non-permissioned role ID

Assign Users to a Role

If a user is already assigned to a role, calling this endpoint will overwrite the role, and assign the user a new role.

POST `/v1/roles/:id/relationships/assigned_users`

Example:

REQUEST RESPONSE

```
POST https://examplefirm.addepar.com/api/v1/roles/90/relationships/assigned_users

{
    "data": [
        {
        "id": "2000",
        "type": "users"
        }
    ]
}
```

Response Codes:

- `204 No Content`: Success
- `400 Bad Request`: Nonexistent/non-permissioned user/attribute ID
- `404 Not Found`: Nonexistent/non-permissioned role ID

Update Users Assigned to a Role

Updates the specified users assigned to a role.

PATCH `/v1/roles/:id/relationships/assigned_users`

Example:

REQUEST RESPONSE

```
PATCH https://examplefirm.addepar.com/api/v1/roles/80/relationships/assigned_users

{
    "data": [
        {
        "id": "2000",
        "type": "users"
        }
    ]
}
```

Response Codes:

- `204 No Content`: Success
- `400 Bad Request`: Nonexistent/non-permissioned user/attribute ID
- `404 Not Found`: Nonexistent/non-permissioned user ID

Remove Users from a Role

Removes a specified user from a role.

DELETE `/v1/roles/:id/relationships/assigned_users`

Example:

REQUEST RESPONSE

```
DELETE https://examplefirm.addepar.com/api/v1/roles/80/relationships/assigned_users

{
    "data": [
        {
        "id": "2000",
        "type": "users"
        }
    ]
}
```

Responses:

- `204 No Content` : Success
- `400 Bad Request` : Failed to provide an id or tried to delete a role that cannot be deleted
- `403 Forbidden` : User lacks sufficient application permissions
- `404 Not found` : No role exists with the provided id in the firm

What's Next

Users

ADDEPAR

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